

Minutes of the Pre-Proposal Conference

January 24, 2020

At the U.S. Embassy Lisbon, Portugal

19P05020Q0004

The meeting was called to order at 9:45 am. The Procurement Supervisor welcomed all attendees and introduced herself Adelia Monteiro, Procurement Supervisor (PS), Todd Bate-Poxon (HRO), Carmo Mariano (HRA), Laura Spadacino (HRA) and José Gregorio, Procurement Assistant (Note Taker).

Representatives of the following firms (Prospective Offerors) attended the meeting:

- Ana Luis – Insightout
- Ana Pinto Coelho - Insightout
- Paula Gonçalves Pereira – Coaching PT
- Paula Capaz – Coaching PT
- Maria João Martins Coaching PT
- Sacha Pereira Matias - Empreendedor

The Procurement Supervisor (PS) explained briefly the conference parameters and that all complex questions would have to be submitted in writing and would be answered subsequently. She also indicated that any changes to the solicitation would be done in the form of written amendments and will be sent to the prospective offerors and must be acknowledged in writing.

The PS informed all present that all the information regarding this solicitation will be available to all equally. It was also indicated that the solicitation and the whole contracting process is in accordance with United States Government regulations, i.e. Federal Acquisition Regulation (FAR), Department of State Acquisition Regulations (DOSAR) and the Office of the Procurement Executive (AOPE).

All the questions and the Embassy's official answers will be on a separate page entitled "Questions and Answers" and it will be posted on the Embassy's website.

PS indicated that on form SF-1449 (cover page of the solicitation) blocks 17, 24 and 30a. and 30b. would have to be filled out by the offeror. Information required on Block 19-24 will be provided in Section 1 – The Schedule – III. Pricing.

The PS indicated that the Contracting Officer Representative (COR) will be the Human Resources Officer (HRO). He is the liaison person between the Contractor and the Contracting Officer (CO).

The PS continued the meeting by referring to Section 2- Contract Clauses (Federal Acquisition Regulation FAR and Department of State Acquisition Regulation DOSAR). Some contract clauses are inserted by reference, others are in full on the solicitation. The clauses may be found online, at the Office of the Procurement Executive web page for additional information. These websites are subject to change. Department of State Acquisition website is available at the following address:

<https://www.ecfr.gov/cgi-bin/text-idx?SID=2e978208d0d2aa44fb9502725ecac4e5&mc=true&tpl=/ecfrbrowse/Title48/48chapter6.tpl>

PS referred to Section 3 – Solicitation Provisions that refer to the documents that need to be provided with the proposal. Failure to submit these documents may result in disqualification. In the event of minor documentation being omitted in your proposal we may contact you to request you to present those documents. The PS stated that the prospective offerors should review their checklist, before its submission. The prospective quoter should submit a work-plan, meaning how would he/she be executing the work; should also submit copies of permits and licenses, copies of insurance policies and other relevant documentation.

Quotations are due for submission on February 7, 2020 on or before 4pm by email to lisbonprocure@sate.gov or in hardcopy to Embassy of the United States of America, C/O Contracting Officer, GSO, Avenida das Forças Armadas, 1649-044 Lisboa . No late submissions will be accepted. PS mentioned that statements made at the pre-proposal conference do not change the solicitation. As stated earlier in the meeting, all communication has to be in writing, if there are any additional questions, please make sure that they are put in writing and submitted by February 3, 2020, the answers will also be in writing and will be posted on the Embassy website.

Payment clause – please note that once we sign the contract, we cannot deviate, the PS stated. As part of the necessary documentation, you will be required to submit proof of insurance.

All proposals will be scrutinized by a Technical Evaluation Panel (REP) that will focusing on the technicalities of the proposals without have access to its price. Subsequently, award is based on the findings produced by the TEP and on the lowest technically acceptable proposal.

The PS focused the importance placed by Department of State on issues related to Combating Human Traffic (FAR 52.222-50).

Section IV – representations and certifications.

The Procurement Supervisor continued to address the meeting by calling everyone's attention to Section 3, regarding the importance of registering in the SAM (www.sam.gov System Award Management)

registration, which has become mandatory for all contractors engaging in business with the US Government for contracts above thirty thousand US dollars.

The HRO addressed the meeting by reviewing the Statement of Work (SOW) that is incorporated in the Solicitation. HRO began by explaining the duties and roles of the Embassy personal within the contract, namely the roles of the Contracting Officer Representative (COR). He explained briefly the roles of the COR vs Contractor. HRO explained that US Officers constantly rotate, each remaining at the Embassy for two to three years and that these rotations may affect the interrelationship with the Embassy Locally Employed Staff (LE Staff). It was also mentioned that LE Staff are in fact a significant part of the Embassy backbone as they have the continuity role and history background of the mission itself. Carmo Mariano (HRA) also emphasized how daily work is a constant challenge for the LE Staff given the constant changes and transitions.

Question 1- Session 1 – How large will be the group for Session 1.

Answer: We anticipate a group of 10 employees. Session 1 will be delivered to a group of future retirees. The contractor will help in developing key questions that will be posed to the group in order to identify their concerns for the impending transition.

Session 1 – Will be for a group of people working at the Embassy who will have 30 or more years of service at the time of retirement. LE Staff dedicating a lifetime to the workplace will face difficulties dealing with transition from an active life. We count on your professional expertise to advise and suggest manners to help in managing the transition from an active professional lifestyle to a new life paradigm and coping with change in a healthy way, both mentally and emotionally.

On the proposal, it is important that the prospective quoter (contractor) demonstrates evidence of past performance relating to the theme of Session 1, and how he/she intends to address this type of work, the HRO stated.

Question: Session 2 – How many people will be participating?

Answer: We do not know yet the size of the audience. However, we expect to have between 10 to 15 participants as we will invite a larger group.

Question: How many hours per session?

Answer: For session 1, please provide a quote for one four-hour session with the option of three additional four-hour sessions. For session 2, please provide a quote for two half-day sessions (a total of 8 hours) and an option of one additional four-hour session. Based on the initial session(s), we will talk to the employees to determine whether the optional additional sessions are needed. If the additional sessions are held, they will most likely be occur on a weekly basis.

Question: Session 2 – The scope of session 2 differs from session 1 it seems more like a workshop. Probably targeting a different audience.

Answer: Yes, the audience will be a larger group within the Embassy. While Session 1 is directed to a particular group of current employees who will retire in the next 10 years, Session 2 is open to all interested LE Staff. It is intended to present guidance and action tools to work in a multi-cultural environment and to smoothly adapt to constant changes in the workplace and in supervision. The aim is to boost teamwork, motivate employees, enhance communication, and build confidence and trust among peers and management

Question: Would the sessions be in English or in Portuguese language?

Answer: Both sessions should be conducted in Portuguese language to the targeted audience. The Ambassador may meet and greet the attendees in the beginning of the Sessions. Should this be the case, and for courtesy purposes, the interaction with the Ambassador must be in English.

Pricing:

The PS stated that proposals may be divided by Session.

Payment:

Payment is made after full acceptance and receipt of the work. The UGS does not make advance payments and usually effects payment using electronic bank transfers (EFT).

The pre-proposal conference ended by 10.45 am and all attendees were escorted out.
